FIG. 1
(PRIOR ART)

FIG. 2

RELATIONSHIP MANAGEMENT SYSTEM — 32

CALL CENTER RESOURCE DATA — 40

RELATIONSHIP MANAGER — 42

RELATIONSHIP PROFILES — 44

STRATEGY AND ACTION MANAGEMENT SYSTEM — 34

ACTION DETAIL DATA — 50

ACTION BUILDER — 52

AVAILABLE ACTIONS — 54

STRATEGY MANAGER — 58

GOAL DATA — 56

STRATEGY PROFILES — 60

STATISTICS DISPLAY SYSTEM — 36

STATISTICS DISPLAY MANAGER — 64

STATISTICS DATA — 62

30

202 — DEFINE RESOURCE DATA

204 — OPEN AND DISPLAY
RELATIONSHIP MANAGER
INTERFACE

206 — OPEN A NEW OR EXISTING
RELATIONSHIP PROFILE

208 — RECEIVE A USER SELECTION
OF A RESOURCE
FUNCTIONAL CATEGORY

210 — DISPLAY AVAILABLE
RESOURCES WITHIN
THE SELECTED RESOURCE
FUNCTIONAL CATEGORY

212 — RECEIVE A USER SELECTION
OF A RESOURCE
WTITHIN THE SELECTED
CATEGORY

214 — ASSIGN USER-SELECTED
RESOURCE TO THE
RELATIONSHIP PROFILE

216 — ANOTHER RESOURCE ?
YES   NO

218 — ANOTHER CATEGORY ?
YES   NO

220 — SAVE THE RELATIONSHIP
PROFILE

222 — CREATE A RELATIONSHIP
KEY FIELD CORRESPONDING TO
THE SAVED RELATIONSHIP
PROFILE

224 — CLOSE RELATIONSHIP MANAGER

FIG. 3

```
                    ┌─────────────────────┐
         242         │  DEFINE GENERIC ACTION │
                     │     DETAIL DATA        │
                    └─────────────────────┘
                              │
                              ▼
                    ┌─────────────────────┐
         244         │   OPEN AND DISPLAY     │
                     │   ACTION BUILDER       │
                     │     INTERFACE          │
                    └─────────────────────┘
                              │
                              ▼
         246        ┌─────────────────────┐
                     │ RECEIVE A USER SELECTION │
           ┌────────│   OF AN ACTION TYPE    │
           │        └─────────────────────┘
           │                  │
           │                  ▼
           │   248   ┌─────────────────────┐
           │          │  DISPLAY GENERIC ACTION │
           │          │     DETAIL DATA FOR     │
           │          │ THE SELECTED ACTION TYPE │
           │          └─────────────────────┘
           │                  │
           │                  ▼
           │   250   ┌─────────────────────┐
           │          │  RECEIVE USER-DEFINED  │
           │          │ ACTION DETAIL DATA AND │
           │          │  ADD TO GENERIC ACTION │
           │          │ DETAIL DATA TO CREATE  │
           │          │ A CUSTOMIZED AVAILABLE │
           │          │        ACTION          │
           │          └─────────────────────┘
           │                  │
           │                  ▼
           │   252   ┌─────────────────────┐
           │          │  SAVE THE CUSTOMIZED   │
           │          │   AVAILABLE ACTION     │
           │          └─────────────────────┘
           │                  │
           │                  ▼
           │   254        ╱─────────╲
           │  YES        ╱             ╲
           └────────────  CREATE ANOTHER?
                         ╲             ╱
                          ╲─────────╱
                              │ NO
         256                  ▼
                    ┌─────────────────────┐
                     │    CLOSE ACTION        │
                     │     BUILDER            │
                    └─────────────────────┘
```

FIG. 4

262 DEFINE GOAL DATA

264 OPEN AND DISPLAY STRATEGY MANAGER INTERFACE

266 OPEN A NEW OR EXISTING STRATEGY PROFILE

268 RECEIVE A USER SELECTION OF A GOAL CATEGORY

270 RECEIVE A USER SELECTION OF A GOAL WITHIN THE SELECTED GOAL CATEGORY

272 RECEIVE AT LEAST ONE USER-DEFINED STRATEGY THRESHOLD FOR THE SELECTED GOAL

274 RECEIVE A USER SELECTION OF AT LEAST ONE AVAILABLE ACTION TO OCCUR WHEN EACH USER-DEFINEDTHRESHOLD IS REACHED

276 SAVING THE THRESHOLD(S) AND SELECTED ACTION(S) AS AVAILABLE GOALS WITHIN THE STRATEGY PROFILE

278 CREATE ANOTHER?

YES

NO

280 CLOSE STRATEGY MANAGER

FIG. 5

●

302 — COLLECT CALL CENTER STATISTICS DATA

304 — OPEN AND DISPLAY STATISTICS INTERFACE

306 — PRESENT STATISTICS DISPLAY OPTIONS CORRESPONDING TO RELATIONSHIP PROFILES

308 — DISPLAY STATISTICS DATA PERTAINING TO RESOURCES IN THE RELATIONSHIP PROFILE CORRESPONDING TO A USER-SELECTED DISPLAY OPTION

310 — PRESENT VIEWING OPTIONS CORRESPONDING TO THE TYPE OF STATISTICS TO BE DISPLAYED

312 — DISPLAY THE TYPE OF STATISTICS DATA CORRESPONDING TO A USER-SELECTED VIEWING OPTION

314 — PRESENT VIEW FORMATS CORRESPONDING TO THE LEVEL OF DETAIL AND FORMAT OF THE STATISTICS

316 — DISPLAY THE STATISTICS DATA IN A USER-SELECTED VIEW FORMAT

FIG. 6

●

320 — COMPARE STATISTICS DISPLAYED IN THE STATISTICS INTERFACE TO GOALS

322 — HAS A USER-DEFINED THRESHOLD BEEN MET?

YES

NO

324 — PROVIDE INDICATION IN A REGION OF THE STATISTICS INTERFACE CONTAINING THE STATISTICS THAT DO NOT MEET THE THRESHOLD

FIG. 7

FIG. 8

Relationship Management

System Name: Cedar Rapids, IA - 1

Relationship Profiles

Credit Card Relationship
P   B   Relationship
Sales Relationship
Technical Support Relationship

New   Delete   Duplicate

Available Relationships
Current Profile

All

2342 - Inbound DNIS
2343 - Inbound DNIS
2344 - Inbound DNIS
2345 - Inbound DNIS
BALANCE - IVR Application
CLARE - Agent Work Group
D30_HIGH - Outbound Table
D30_Low - Outbound Table
DEPOSIT - IVR Application
RECOVERY - Outbound Application
Walsh, Mike - Individul Agent

New   Delete   Duplicate

Add Relationship Profile

Profile Name   P   B   Relationship

Description   These are the business relationships between the various call center
objective Davox is managing

Save   Cancel

Relationship Assignments

Inbound DNIS

Inbound DNIS
Outbound Tables
Outbound Applications
IVR Applications
Agent Work Groups
Individual Agent

☐ 2345 - Inbound DNIS

Save   Cancel

80

Action Builder

Available Actions

Page Technical Support
Send E-Mail to Agents
Send E-Mail to Functional VP
Send E-Mail to Direct Manager
Send E-Mail to Davox
Move Agents to Gold Queue
Move Agents to Platnium Queue
Alert Mangers in Work Group A
Send Quality Message to Reports
Send Supervisor Alert
We Made It - Email
Change Stat Color Purple
Print Volume Spike Report

86

Action Name and Type

Name: We Made It - Email

Type of Action:

82

Action Details

84

New   Delete   Duplicate

Save   Cancel

FIG. 9

90

Strategy Manager - System Name: Cedar Rapids, IA - 1

Strategy Manager

Strategy Library

Tuesday Goals
Morning Goals
Evening Goals
Strategic Corporate Goals
Tactical Corporate Goals

94

New   Delete   Duplicate

Add Profile

Profile Name: Monday Goals

Description: This is the latest goals that I need to accomplish on Mondays

96

○ Queue Relationship   ○ Agent Relationship   ○ System Relationship

Save   Cancel

Available Goals

Current Profile

Monday Goals

All

Selected goals

Average Answer Rate
Average Speed of Answer

95

97

Strategy Details

Select Class: Queue Strategies

Select Strategy:

All
Queue Strategies
Agent Strategies
IVR Strategies
External Device Strategies
System Strategies

Queue Relatior

92

Optimization Min

zation Max

24 Seconds 82 %   30 Seconds 80 %   34 Seconds 7

Action Selection

☐ Page Technical Support
☐ Send E-Mail to Agents
☐ Send E-Mail to Functional VP
☐ Send E-Mail to Direct Manager
☐ Send E-Mail to Davox
☐ Move Agents to Gold Queue
☐ Move Agents to Platnium Queue
☐ Alert Mangers in Work Group A

99

Action Selection

☐ Page Technical Support
☐ Send E-Mail to Agents
☐ Send E-Mail to Functional VP
☐ Send E-Mail to Direct Manager
☐ Send E-Mail to Davox
☐ Move Agents to Gold Queue
☐ Move Agents to Platnium Queue
☐ Alert Mangers in Work Group A

Action Selection

☐ Page Technical Sup
☐ Send E-Mail to Ager
☐ Send E-Mail to Func
☐ Send E-Mail to Dire
☐ Send E-Mail to Dav
☐ Move Agents to Gol
☐ Move Agents to Pla
☐ Alert Mangers in Wc

98

New   Delete

Save   Cancel

FIG. 10

Fig. 11

Call Center Statistics: Cedar Rapids, IA-1

Display   Management   Preferences

Relationship ▼
Task ▼
WorkGroup ▼

Tom
Andrew
Michael

Queue Statistics Screen

Current Stats View: Service Level

Queue	Calls in Queue		Avg Speed of Answer		Abandon Rate		Service Level	
	Current	Daily	(n) Min	Daily	(n) Min	Daily	(n) Min	Daily
Customer Service	235	1,235	9 Secs	7 Secs	2.4%	5.8%	95/9	92/1
Sales Orders	45	632	1 Secs	7 Secs	.4%	3.2%	99/1	96/

Outbound

Current Stats View: Volumes

Campaign	Call Records	Contact Rate	Connect Rate	Agent Util	Start Time	Active Time	Calls
Campaign 1	10,000	35/hr	50/hr	95%	8:35 AM	4.35 Hrs	
Campaign 2	20,000	27/hr		93%	9:10 AM	2.78 Hrs	

E-Mail

Current Stats View: Results

Queue	# of E-Mails	Avg Speed of Response	# Active Agents	Avg Handle Time
Technical Support	6,543	11.5/Hrs	22	9:
Information Request		4.2/Hrs	12	

110

Queue Preferences

Display Categories

| Queue |

Available Statistics **112**

Service Level
# of Calls Abandoned from Queue
% of Calls Abandoned while Ringing
# of calls Abandoned while Ringing
% of calls Abandoned while Ringing
# of Calls Abandoned while on Hold
% of Calls Abandoned while on Hold
# of Calls Defaulted
% of Calls Defaulted
Average Speed of Answer
Age of Oldest Call in Seconds/ Minutes
Average Time in Queue
Total Calls
# of Agent Transfers within Queues
% of Agent Transfers within Queues
# of Agents Transfers out of Queue
% of Agents Transfers out of Queue
# of Agents Transfers off Premise

Available Statistical Display Classes

Andy
Tom
My Preference

Selected Statistical Display Classes

My Preference

Statistics in Order of Display **114**

Service Level
# of Calls in Queue
Average Speed of Answer
# of Calls Abandoned from Queue
% of Calls Abandoned while Ringing

[New] [Save] [Delete] [UnDo]

FIG. 12

100

Queue Statistics Screen

Inbound		Current Stats View	Service Level					**108**
Queue	Calls in Queue		Avg Speed of Ans	Service Level				
	Current	Daily	(n) Min Daily	Volumes				
Customer Service	235	1,235	9 Secs	Agents				
Sales Orders	45	632	1 Secs	7 Se Results				
				My Preference				

FIG. 13

FIG. 14

FIG. 15

FIG. 16

FIG. 17

Fig. 18

System Name: Cedar Rapids, IA-1
File View Display Preferences

Agent Statistics Screen

Call Center Agents

Current State View | Time

Resource	State	Logged In	Talk	Time
Anderson, Clare	Idle	6.5 Hrs/100%	2.0 Hrs/3	Time
Browne, Andy	Wrap	3.0 Hrs/100%		Volume
Cox, Robert	Wrap	3.0 Hrs/100%		Rate
				Efficiency

130

Agent Preferences

Available Statistics

State
Logged In
Total Talk
Total Idle
Total After Call Work
Total Aux Work
% of Agent Time Working Inbound
% of Agent Time Working Outbound
% of Agent Time Working Email
Outbound Talk
Outbound Idle
Outbound After Call Work
Inbound Talk
Inbound Idle
Inbound After Call Work
Email Correspondence
Web Chat Time
Scheduled Break 1
Scheduled Break 2
Scheduled Break 3
Total Calls
Total # Inbound Calls

132

Available Statistical Display Classes

Andy
Tom
My Preference

Selected Statistical Display Classes

My Preference

Statistics in Order of Display

Total Calls
Total # Inbound Calls
Total # Outbound Calls
% of Agent Time Working Inbound

134

New   Save   Delete   UnDo

FIG. 19

120

Agent Statistics Screen

Call Center Agents		Current Stats View		Time	
Resource	State	Logged In	Talk	Time	
Anderson, Clare	Talk	6.5 Hrs/100%	2.0 Hrs/3	Time	
Browne, Andy	Wrap	3.0 Hrs/100%		Volume	**126**
Cox, Robert	Wrap	3.0 Hrs/100%		Rate	
				Efficiency	
				My Preference	

FIG. 20

_136_

Agent Statistics

File View Agent Window Help

Agent Status

Agents Displayed: 12   Sort by: Average Talk Time

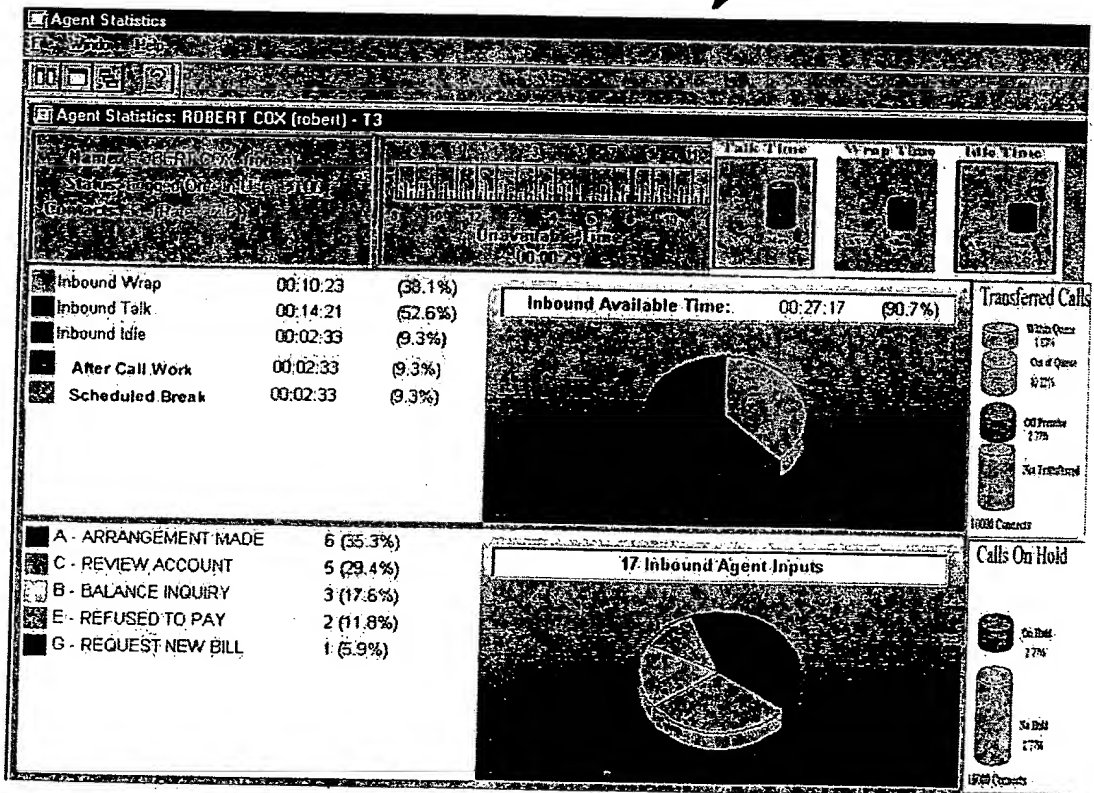|		
CHAMBERLAIN, TOM (tom) BLEND .106 01:23 TEAM2 DLQ_90 (COLLDEMC	CHEPONIS, SUE (sue) BLEND 106 01:23 TEAM1 REMINDER (COLLDEMC	PARKER, RANDY (randy) BLEND 106 01:20 TEAM2 SLOW_PAY (COLLDEMC
ANDERSON, CLARE (clare) BLEND 105 01:19 TEAM1 H_INCOME (TELDEMO)	WALSH, MICHAEL (michael) BLEND 103 01:09 TEAM2 LIST1 (TELDEMO)	KNOTEK, PETER (peter) BLEND 103 01:08 TEAM1 INBOUND (INBOUND)
BROWN, ANDREW (andrew) BLEND 100 01:07 TEAM2 SLOW_PAY (COLLDEMC	CORBETT, VINCE (vince) BLEND 106 01:07 TEAM2 LIST3 (TELDEMO)	WALSH, NANCY (nancy) BLEND 96 01:06 TEAM1 INBOUND (INBOUND)
COX, ROBERT (robert) BLEND 105 01:06 TEAM2 DLQ_60 (COLLDEMC	BOUDOUSQUIE, ALLISON(allison) BLEND 103 01:05 TEAM1 DLQ_30 (COLLDEMC	ALLEN, JOE (joe) BLEND 95 01:03 TEAM1 INBOUND (INBOUND)

FIG. 21

_138_

Agent Statistics

File Window Help

Agent Statistics: ROBERT COX (robert) - T3

Talk Time   Wrap Time   Idle Time

Unavailable Time 00:00:

Inbound Wrap	00:10:23	(38.1%)
Inbound Talk	00:14:21	(52.6%)
Inbound Idle	00:02:33	(9.3%)
After Call Work	00:02:33	(9.3%)
Scheduled Break	00:02:33	(9.3%)

Inbound Available Time: 00:27:17 (90.7%)

Transferred Calls

A - ARRANGEMENT MADE	6	(35.3%)
C - REVIEW ACCOUNT	5	(29.4%)
B - BALANCE INQUIRY	3	(17.6%)
E - REFUSED TO PAY	2	(11.8%)
G - REQUEST NEW BILL	1	(5.9%)

17 Inbound Agent Inputs

Calls On Hold

FIG. 22